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Micro-to-Mainframe Links • Voice Recognition Systems

16th Annual Micrographics Usage Survey

Software Licensing • Telecommunications Management

Age of Systems Integration?

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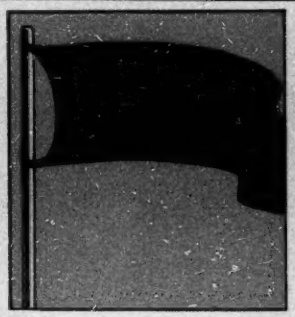


80

62

94

FEATURES

34
Inforum:
Technology and Top Management
Executives may be depending too much on technological solutions for corporate problems.

38
Will This Finally Be the Age of Systems Integration?
An integrated information system should be built on a data base that stores voice, numbers, text and image data for the shared use of everyone.

42
Planning for Importance
As sound management of telecommunications becomes increasingly vital, a departmental business plan can ensure that corporate goals are defined and achieved.

46
A Primer on Managerial Accounting
Allocation of costs, responsibility centers and break-even points are important in a well-thought-out managerial accounting system.

50
Resolving the Chinks in Micro-to-Mainframe Links
Use, abuse, security and training all need to be investigated before PCs are linked to mainframe computers.

56
Micro Networks: Integrating PC Users and MIS
Innovations in LANs and micro networks are emerging just as MIS managers are beginning to chart new territories.

62
MIS Harnesses the Phonetic Engine
Training the machine—not the user—is one idiosyncrasy of voice recognition systems.

68
Beyond the Advice of a Friend
The contract encompassing a software agreement is a complex legal document.

74
Snyders on Software:
Pinning Down Performance

80
It's True! PC-Based LANs are for Real
MIS executives are ready to create departmental networks and vendors are cooperating.

86
The Corporate Cure-All?
The market will determine how much outside expertise is required.

92
For the Sake of Security: **Of Medicine Shows, Articles and Books**
Be wary of 'free' security software and trade articles written by vendors.

94
Merging Micrographics and MIS
Optical disk storage and microfacsimile are up-and-coming technologies for image management, but integrating a variety of document images is already a reality.

100
16th Annual Micrographics Usage Survey: **Battling an Image Problem**
Many of those who use it seem to be uncertain about what micrographics means.

NEXT MONTH:
28th Annual
DP Salary Survey

INSIDE INFO

14 Data gathered by IS departments can have negative company value
14 HP expects RISC systems to meet MIS needs for next decade
16 Strategic non-use of computers puts General in the driver's seat
20 Two 'low-profile' vendors make bids for the IS spotlight
23 Integration key to information management
25 *The Times* cuts costs and helps agencies make the connection
25 Lotus: no problem when it comes to piracy
27 File transfer program in public domain

APPLICATION REPORTS

70 Court Records
70 Customer Service
72 Report Generating
72 An Integrated Solution
105 Datacomm Networking
105 Banking on Graphics

DEPARTMENTS

6 Feedback
12 Editor's Perspective
30 IN Brief
32 Arnie
76 Info Software
106 Products/Services Info
114 New Micro Products
117 Literature
119 Ad Index
120 The Diebold Report

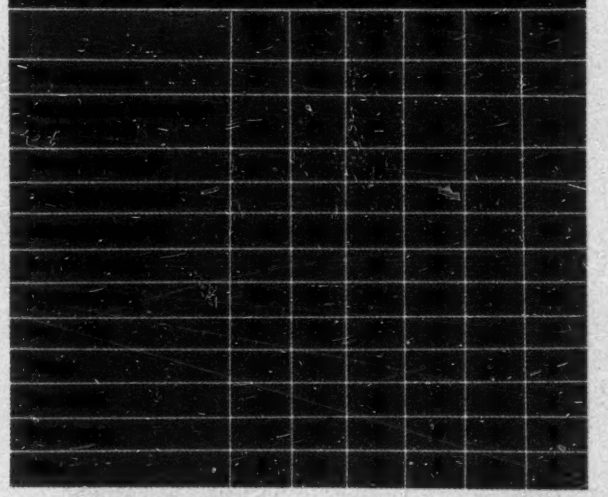
16th Annual Micrographics Usage Survey

Battling an Image Problem

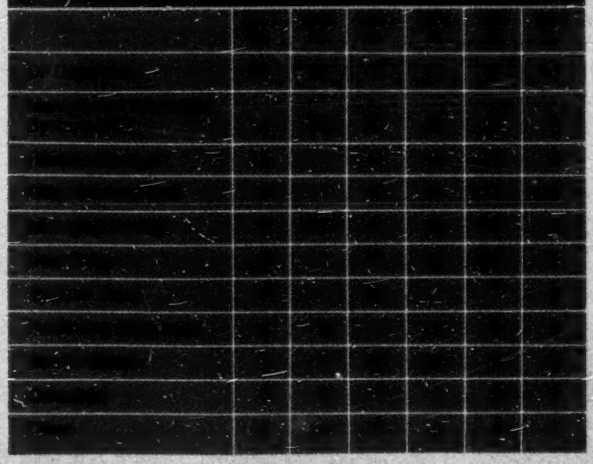
Many of those who use it seem to be uncertain about what 'micrographics' means.

By Chuck Cozette, Associate Editor

Who Designs the Micrographics System(s)



Who Recommends the Type of Micrographics Equipment to Be Purchased



The slowdown in the computer industry and confusion surrounding the various types of document storage have combined to stunt growth in micrographics usage.

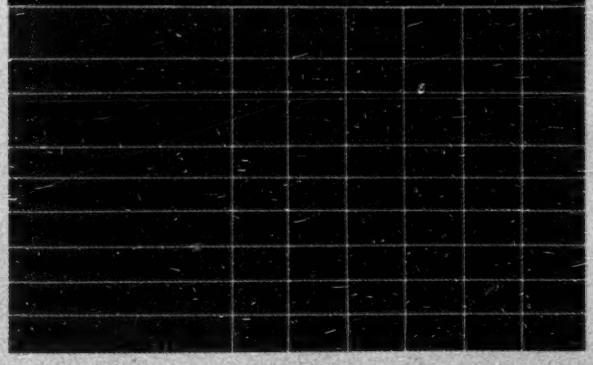
That is one of the key findings of INFOSYSTEMS' 16th Annual Micrographics Usage Survey, which showed spending by the average user declining slightly from $75,000 in 1984 to $71,000 this past year. Anticipated spending for the coming year also is down from the $91,000 that was expected to be spent last year, to the $77,000 planned for the coming year.

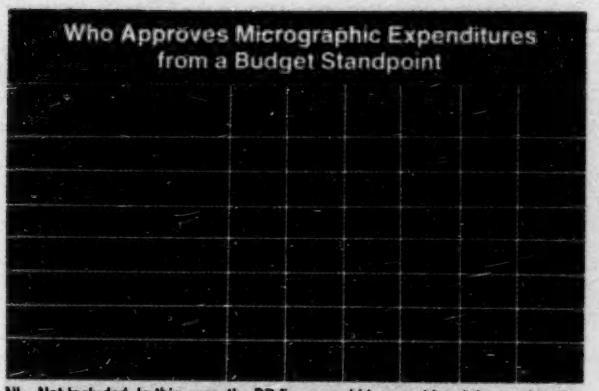
Although 41 percent of those not currently using micrographics claim they will evaluate its potential use in the next year, only 15 percent actually expect to implement a system or begin using a micrographics service bureau. Of those currently using micrographics, the majority foresee little growth. Two thirds say they will simply maintain or replace existing systems.

While decreases in micrographics spending are similar to those in other segments of the computer industry, the computer slump is not the only reason micrographics usage is stagnant. Part of the problem revolves around persistent confusion as to what micrographics really is.

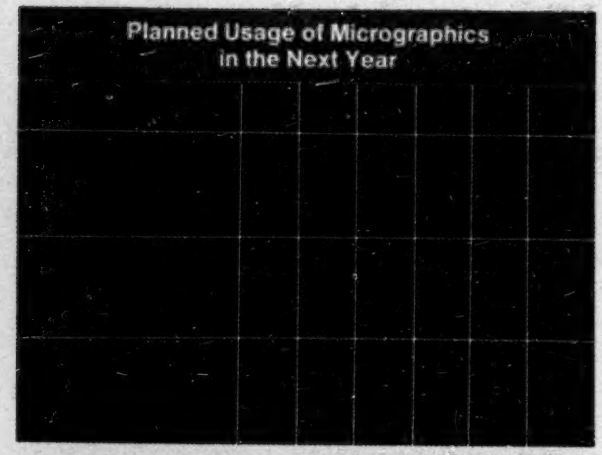
Given the growth of microcomputer use, persons new to the term often mistake micrographics for charts and graphs produced on a small computer. People oriented to the rapid rise of personal computers over the past half dozen years have inadvertantly picked up the word "micro" for small and attached it

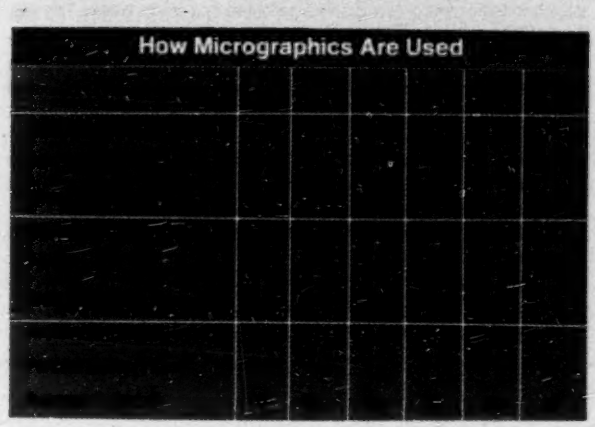
Who Is in Charge of the Micrographics Operation

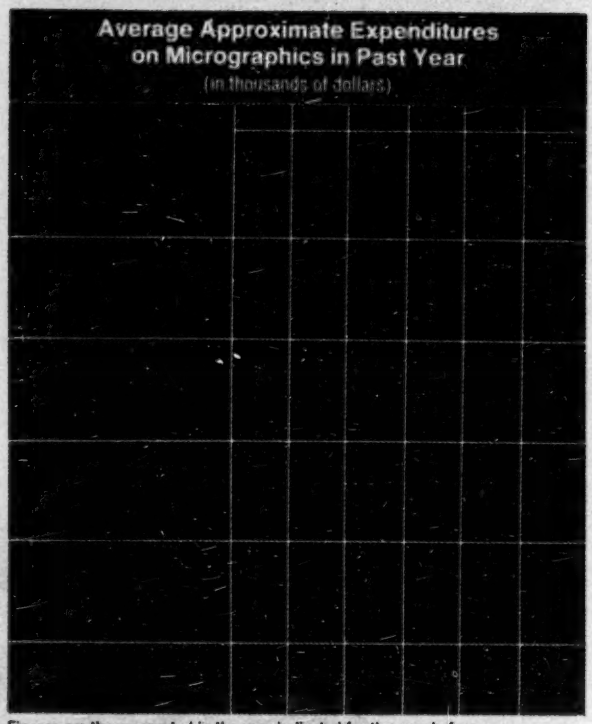




NI—Not Included. In this case, the DP figure could be considered the combination of DP and MIS.







Figures are those reported in the year indicated for the year before.

to "graphics" for charts. But micrographics meaning microfilm/microforms dates to about 1969.

Some within the industry have sought to address this problem by renaming the micrographics function "image management." Such a name change might help confused outsiders, but the roots of the problem extend much deeper.

"Even some people who are using micrographics are unsure as to what it includes," claims Ray Winkler, manager of market research at Hitchcock Marketing & Research Services, Wheaton, IL, which conducted the annual survey.

So just what is micrographics? As defined by INFOSYSTEMS' survey, micrographics is "an all-encompassing term generally accepted to include the creation and usage of all types of microforms and micro-images such as microfilm, microfiche and computer-output microfilm (COM)."

Six thousand surveys mailed drew 1,403 responses—a 23 percent return. Unlike past years, in which the study was sent to a random sampling of people in data processing operations, this year's survey was targeted to individuals previously indicating an involvement in purchasing microfilm/microfiche equipment.

Despite targeting the sample, only 67 percent of those responding indicated they use micrographics. While this was 30 percentage points higher than for the previous year's untargeted sample, Winkler believes actual usage is more extensive than either figure indicates.

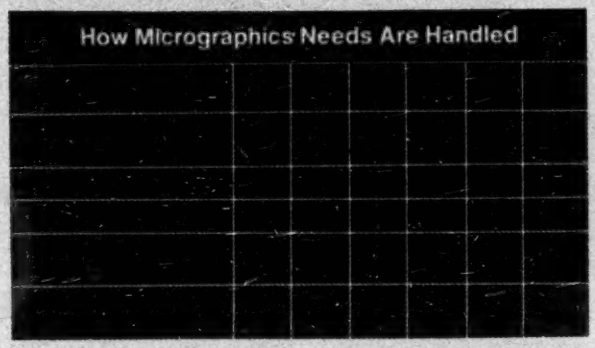
"Those who strictly use an outside service organization sometimes don't consider themselves to be using micrographics," explains Winkler. "Some use microfilm or fiche, but say they aren't using micrographics. And still others are unversed in the newer forms of micrographics."

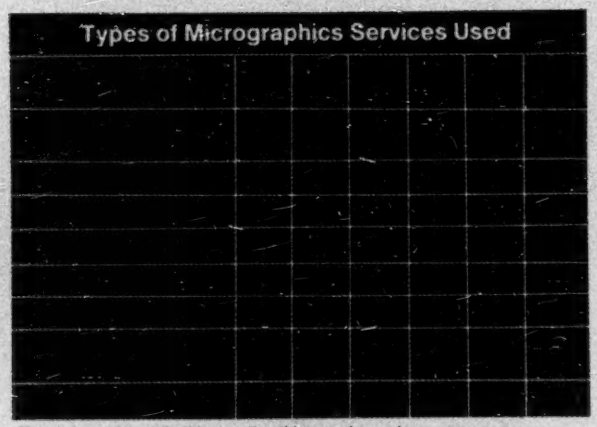
The most promising "newer form" of micrographics is optical disks, used to store digitized images. Although the survey did not specifically ask about optical disk usage, other industry surveys indicate a measurable, albeit gradual, increase. High price and lack of compatibility with existing systems seem to be the biggest drawbacks (For more information on optical storage, see "Merging Micrographics and MIS" in this issue).

Even when people understand the essence of micrographics, there is disagreement on its usefulness. One survey respondent writes, "Everyone should use it." Counters another, "I think the field is dying." A third respondent says, "Our computer-aided retrieval system is the best thing since sliced bread!" Still another respondent predicts, "Laser technology should obsolete micrographics by 1990."

For most, micrographics usage is strictly a matter of the bottom line. "We were previously doing a large amount of microfilming," summarizes one respondent, "but have cut back

16th Annual Micrographics Usage Survey





*There was a change in this question this year. In previous years, users were asked to indicate types of micrographics performed by a service bureau. This year the question just asked what types of micrographics are used.

greatly since a study showed microfilm labor cost exceeded value of paper space saved and other benefits."

For those who do find micrographics to be cost effective, more than half handle most or all of their needs through service bureaus. Twenty-three percent do everything in-house. Although 12 percent plan to do a larger share in-house in the next year, the vast majority (82 percent) expect little or no change in their handling of micrographics.

Banks are the biggest users, with 93 percent of those responding claiming to use some form of micrographics. Utility and communications (84 percent), insurance (80 percent) and finance (78 percent) companies are also extensive users.

The primary function of micrographics, representing almost half of all usage, continues to be archival storage. Almost a third of the images stored by micrographics are referenced on a daily basis, the remaining 23 percent are "semiactively referenced," according to the survey.

COM continues to show steady but gradual growth. The number of respondents using COM through a service bureau rose slightly from 56 percent last year to 58 percent this year. In-house COM usage showed a more significant increase, from 17 percent to 22 percent.

Usage of computer assisted retrieval (CAR) also has risen in recent years. Only seven percent of survey respondents used CAR in 1981 compared to 16 percent this year.

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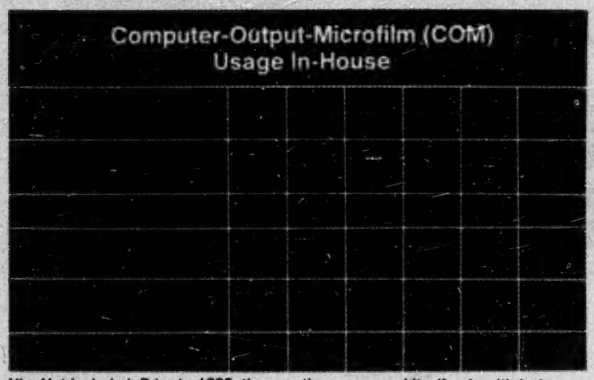
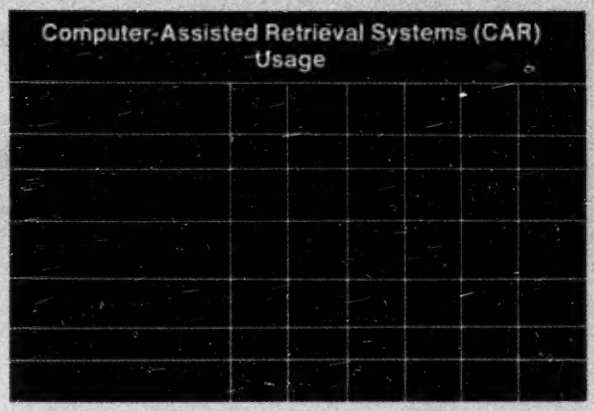


NI—Not Included. Prior to 1985, the question concerned itself only with in-house usage.

Those not using micrographics tend to be find themselves at one of two technological extremes. On the one hand, a small number of respondents commented that they are using optical disk technology to store documents digitally. A far greater number, however, continue to use various forms of hardcopy files.

Writes one respondent, "It's hard to sell users on the idea (of micrographics)—they like paper." Another company reports having an office or department of "paperwork management."

For those companies that have made the move from paper to film and fiche, operational responsibility for the micrographics function typically rests with data processing or management information systems. The DP department is in charge of micrographics 45 percent of the time; MIS, 32 percent.



DP/MIS are also at the forefront in both system design and equipment recommendation, according to the survey. When it comes down to final approval for micrographic expenditures, however, executive and financial management continue to have the final say.

Complete Reports Available

Complete spiral-bound copies of the backup summary of the 16th Annual Micragraphics Usage Survey are available for $50. This summary includes a detailed breakdown, by industry, for each of the survey's 18 questions. Check or company purchase order must accompany all orders. Mail request to INFOSYSTEMS Micrographics Survey, Research Department, Hitchcock Publishing Co., 25W550 Geneva Road, Wheaton, IL 60188.

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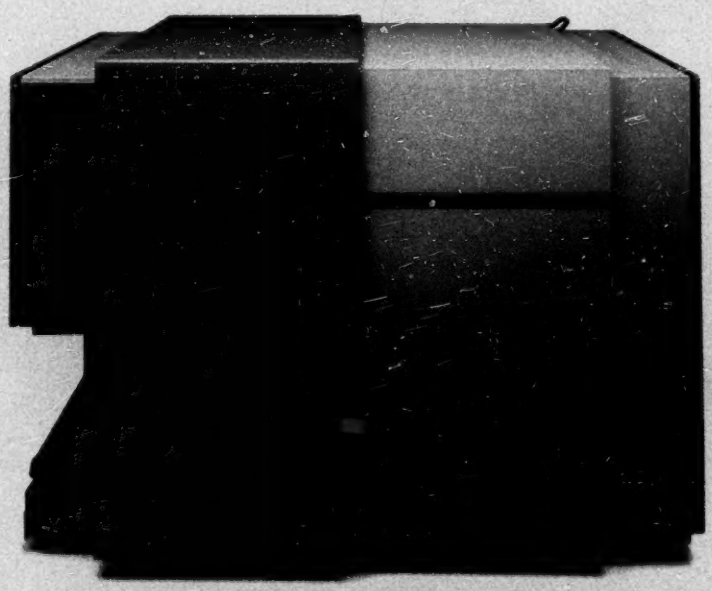

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